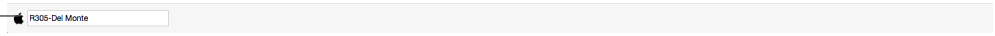
Managing Leads (Introductions)

Viewing New Leads is an important and frequent workflow teams use to follow up with and meet new customers. In this section, you will learn how to create a Filtered Search to view a list of New Leads and save this Filtered Search to easily view New Leads daily. This workflow can be applied to other types of Leads such as those that are In Process or Assigned.

Managing Leads

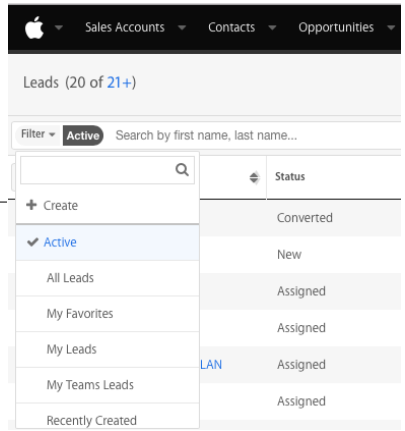
1. Start by ensuring your Store is selected in the Territory Filter at the bottom of the Apple CRM screen.

Ensure your Territory or Store is selected in the Territory Filter



2. In the Leads module List View, click the Filter drop down menu and select Create.

Select Create from the Filter drop down menu



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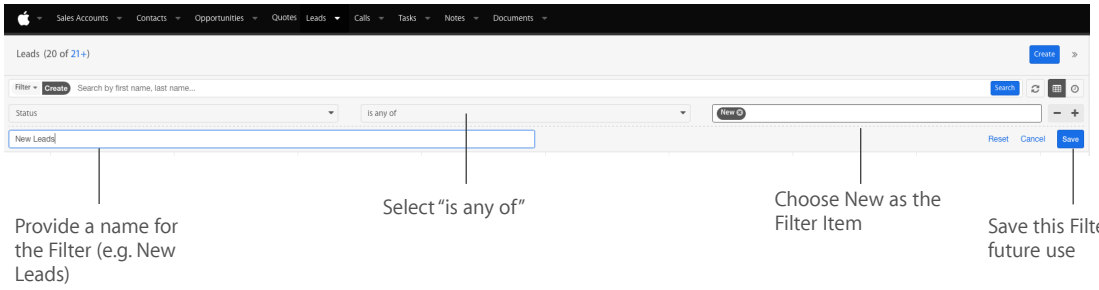
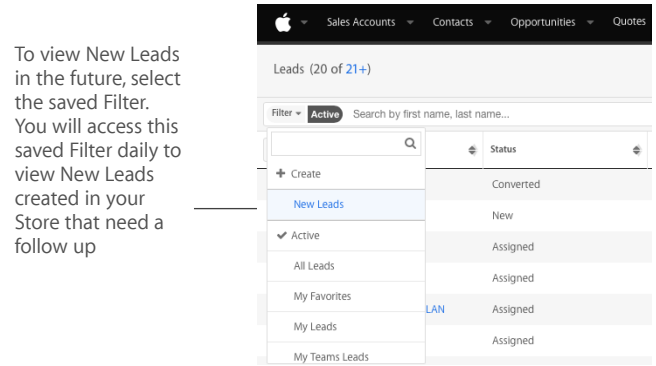
3. Select Status as the Filter Criteria, "is any of" as the second tab (Operator), and New as the Filter Item.
4. Name the Filter and select Save on the far right to use this Filter to search for new Leads in the future.



5. To access your saved Filters, click the Filter drop down menu and select the saved Filter name.
6. As part of your daily workflow to view New Leads (Introductions) created in your Store, access the New Leads Filter you created in steps 1-4. This will produce a list of Leads with New status that have not been actioned and need a follow up.



7. For each New Lead on the list, the next step is to either take action to follow up or assign the Lead to a member of your team.
8. In addition to the New Leads workflow, you can use steps 1-4 to create saved Filters for common ways to search for Leads such as those that were Assigned the day prior or those that were Converted in the past week.

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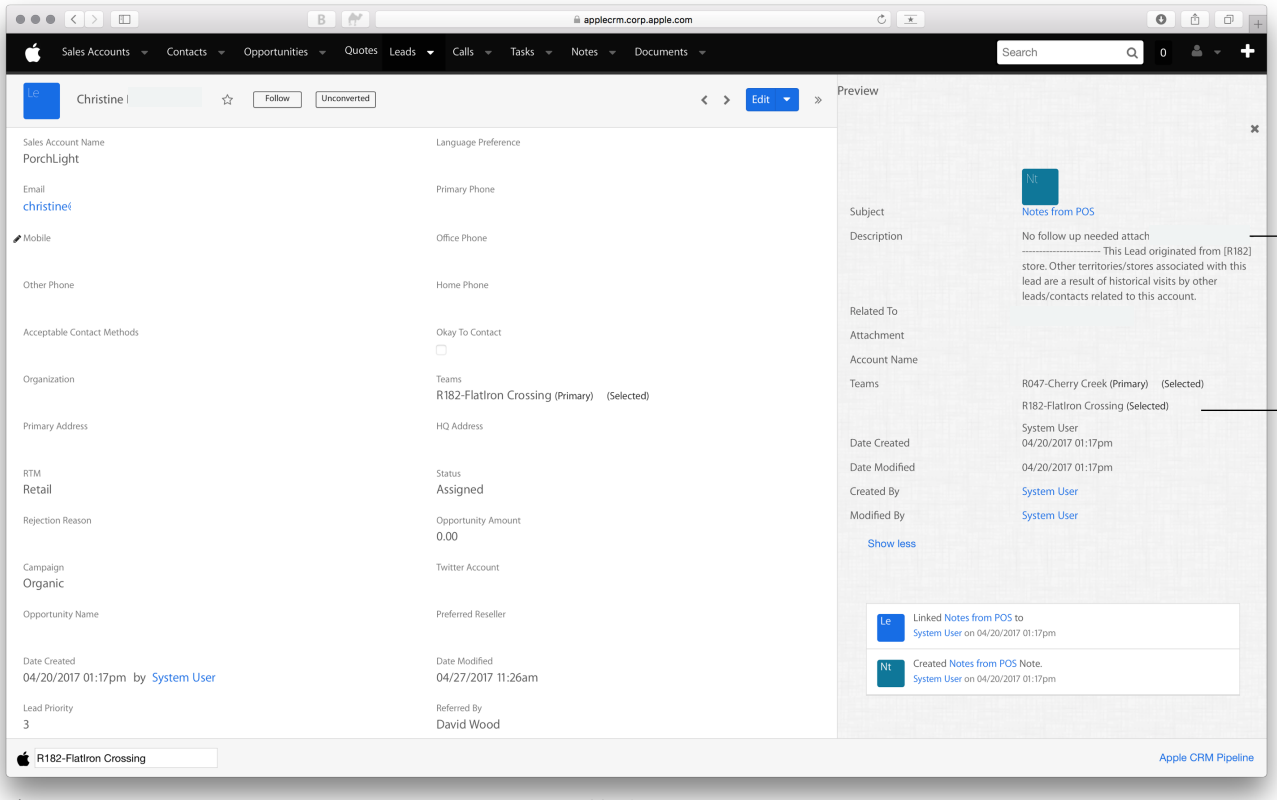
Leads Related to an Existing Sales Account

Overview

Leads in Apple CRM are enriched with data to determine if the Lead is related to an existing Sales Account or Contact. Leads may already have a Primary Account Owner at another Store where the relationship is led. Since these Leads will be assigned to multiple Stores, you will need to partner between teams to create the best customer experience.

Identifying Leads with an Existing Relationship

When viewing a Lead in the Lead Detail screen, open the preview panel. In preview the Description will indicate the Store that the Lead originated from. The Primary Store team associated to the Sales Account will be indicated in the Teams section, along with any other store teams who have engaged the customer historically.



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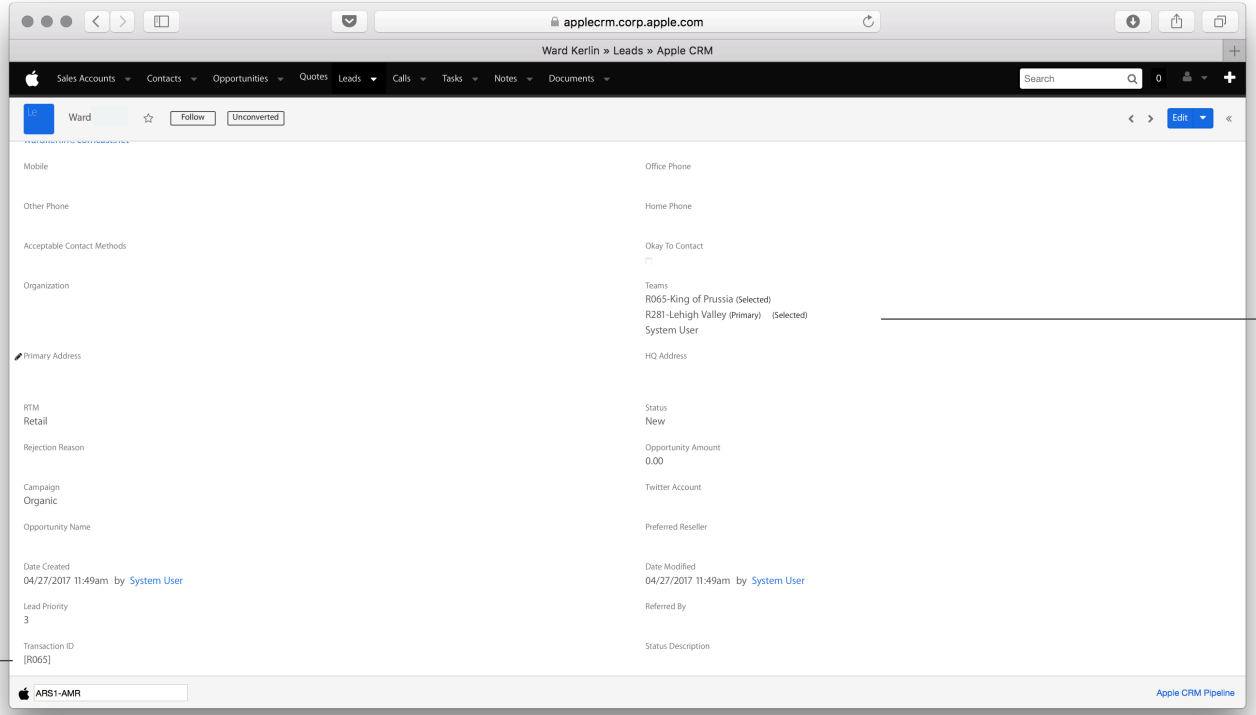
For Leads from EasyPay you can also leverage the Transaction ID and the Teams sections of the Lead Detail View. Leads with an existing relationship will show a Store under Transaction ID that is different from the Primary Account Owner as indicated by (Primary) next to one of the Teams.



View the Transaction ID to see the Store where the Lead originated

Look at the Primary Account Owner as indicated by (Primary). If the Primary Account Owner is different from the Store under Transaction ID, this Lead has an existing relationship outside of the Store where the Lead originated.

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Managing related Leads Workflow

Leads that have a relationship to an existing Sales Account with a Primary Owner will appear as a New Lead for both the Store where the Lead originated and the Primary Account Owner. Below, you will learn how to action these Leads as a member of the Store that originated the Lead and as the Primary Account Owner.

Originating Store

If you are in the Store where the Lead was created, you may convert the Lead as you would with any other new Lead. It is also recommended that you connect with the Primary Account Owner to learn about their relationship with the customer.

Primary Account Owner

If you are the Primary Account Owner and see a new Lead that was not originated from your Store, **do not action the Lead** in Apple CRM. Instead, connect with the team where the Lead originated to share updates about your relationship with the customer and collaborate on the best next steps.

> ### Centralized and Decentralized Sales Accounts
>
> Depending on how the Company is organized, it may make sense to combine all activity into a single Sales Account or create multiple Sales Accounts. For example, Apple CRM may relate a New Lead from a franchisee to an existing franchise or parent company. However, these companies may act as different legal entities and so creating a new Sales Account for the new franchise would make sense, as will managing them separately in different stores.
>
> However, a company with multiple locations but centralized purchasing and a single legal entity would be best organized into a single Sales Account – since the entity acts as a single organization with multiple locations. Contact level relationships and purchasing may still occur but should do so under a single Sales Account to best track the company's overall activity.

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